DOWNTOWN MADISON INC

2020 STATE OF DOWNTOWN MADISON

TABLE OF CONTENTS

3	Introduction	16-17	Education
4-5	Development & Investment	18-19	Retail & Restaurants
6-7	Residents	20-21	Tourism & Attractions
8-9	Housing	22-23	Mobility
10-11	Quality of Life & Safety	24-25	Sustainability
12-13	Office Market	26-27	Capitol East District
14-15	Employment	28-31	COVID-19 Impact

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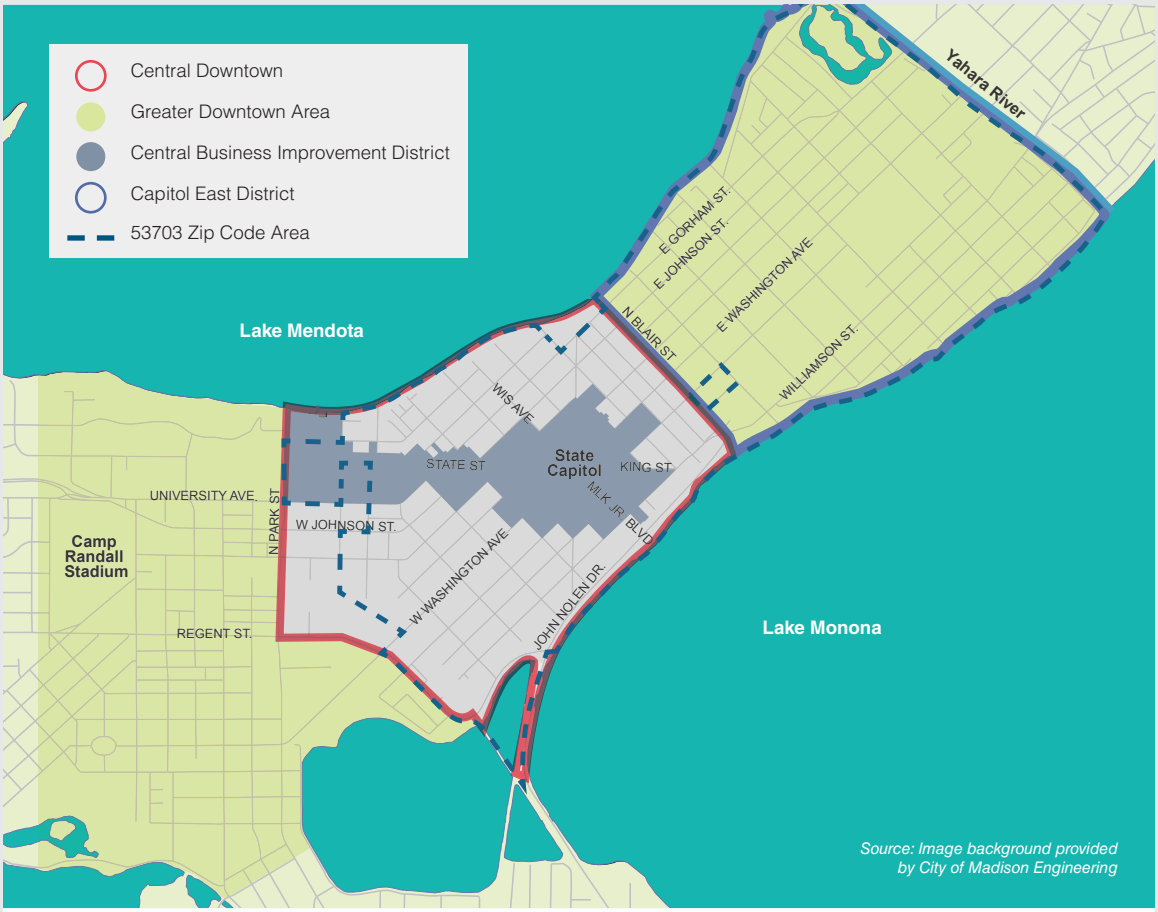
And all other people, businesses and data sources who contributed time and information to this report!

INTRODUCTION

Downtown Madison, Inc. (DMI) is proud to present its tenth annual State of the Downtown, a data driven report that provides objective and accurate information about downtown Madison. Ten years of data has provided us a wealth of information to better understand the current state of our downtown and to help plan for future projects, growth, challenges, and opportunities to maintain a healthy and vital central city.

2020 has been an unprecedented year, and like cities and communities around the country and world, the impact on downtown Madison has been significant. Although much of the information in this report reflects data prior to 2020, a special section has been included at the end of this year's report highlighting the impact of the COVID-19 pandemic so far on downtown Madison. We hope the numbers in this year's report will help begin to inform us on the work needed to best reimagine downtown Madison and position us for the future. We encourage residents, businesses, community organizations, and city officials to join DMI in using the information in this report to help ensure downtown Madison is a thriving, inclusive, and welcoming place for all.



BOUNDARIES & MAP

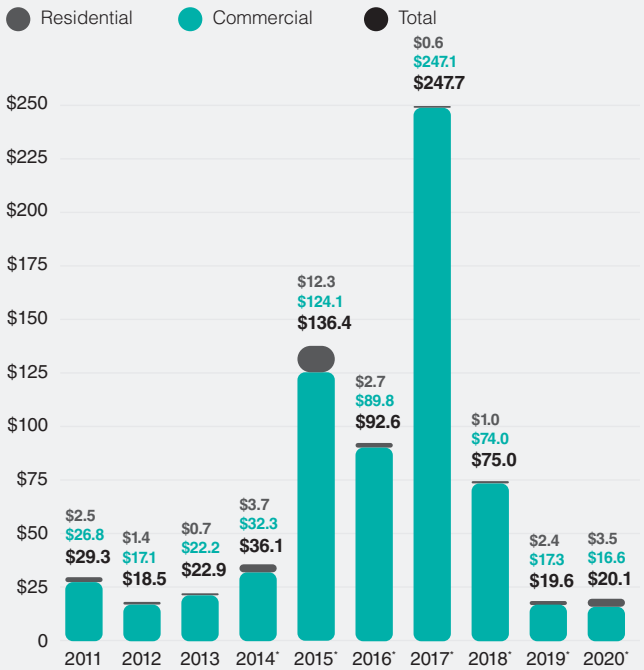
The central downtown is defined in this report as the area bounded by Lake Mendota, Lake Monona, Blair Street and Park Street. The majority of data compiled in this report focuses on the central downtown area. On a broader scale, downtown Madison is often viewed as the Madison isthmus from Camp Randall Stadium on the West to the Yahara River on the East. This broader definition is reflected in various metrics throughout the report, but the primary focus is the central downtown. The geographic boundaries of Madison's Central Business Improvement District (BID), 53703 zip code area as well as the Capitol East District are also used in the report.

DEVELOPMENT & INVESTMENT

- New development approved in downtown Madison in 2019:
  - **7** projects
  - **262** new residential units
  - **253** hotel rooms (re-approved with changes)
  - **18,780** sq. ft. of commercial space
- Residential units constructed or approved for construction in downtown Madison since 2010: **5,311**, which is **28%** of the total residential units constructed and approved citywide
- Acres in downtown Madison: **419**, which is about **1%** of acres citywide*
- Percentage of tax exempt parcel acres in downtown Madison: **39%***

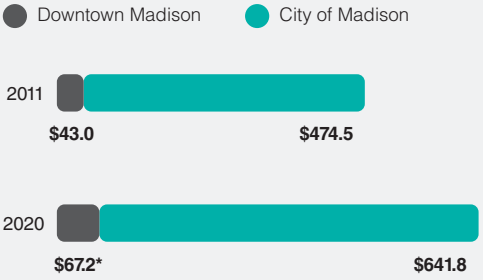
*Sources: City of Madison Planning Division, City of Madison Assessors Office (*compiled by DMI)*

New Construction in Downtown Madison (in millions)



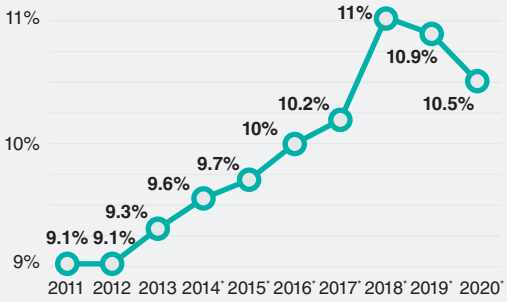
*Source: City of Madison Assessors Office (*compiled by DMI). Residential defined as Single-Family, Condominium, 2-unit and 3-7 unit properties only. All other properties including large apartment buildings defined as commercial. Central Downtown area only. Figures represent new and rehab construction projects.*

Real Estate and Personal Property Taxes Generated (in millions)



*Source: City of Madison Assessors Office & Treasurers Office (*compiled by DMI)*

Citywide Taxes Generated from Downtown Madison



*Source: City of Madison Assessors Office & Treasurers Office (*compiled by DMI)*

In 2020, the tax base in downtown Madison was $3.08 billion, an increase of $1.2 billion, or 64%, since 2011*.

*Sources: City of Madison Assessors Office 2011 & 2020 (*compiled by DMI)*

Development in Downtown Madison 2010-2019

Multi-Family Buildings Constructed 2010-2019
Total Units: 4,741
Approved/Under Construciton Units: 570

- 2-24
- 25-49
- 50-74
- 75-99
- 100-124
- 125-149
- 150-225
- 226-348

Other Projects

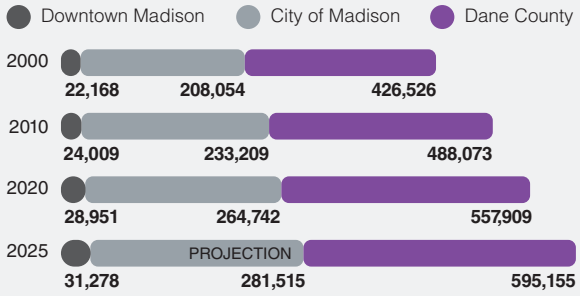
- Approved or Under Construction
- Non-Residential Building

Prepared by the City of Madison Planning Division, July 2020 (the status of all projects are as of 12/31/19)

Image Credit: 1. Drury and SmithGroup, 2. Stone House Development and Eppstein Uhen Architects, 3. Stone House Development and Eppstein Uhen Architects, 4. Kahler Slater, 5. Stone House Development, Knothe & Bruce Architects and Potter Lawson, 6. Potter Lawson

RESIDENTS

Population



*Source: U.S. Census Bureau, 2000, 2010 Census; ESRI estimates, 2020 and 2025 projections**

Age in Downtown Madison

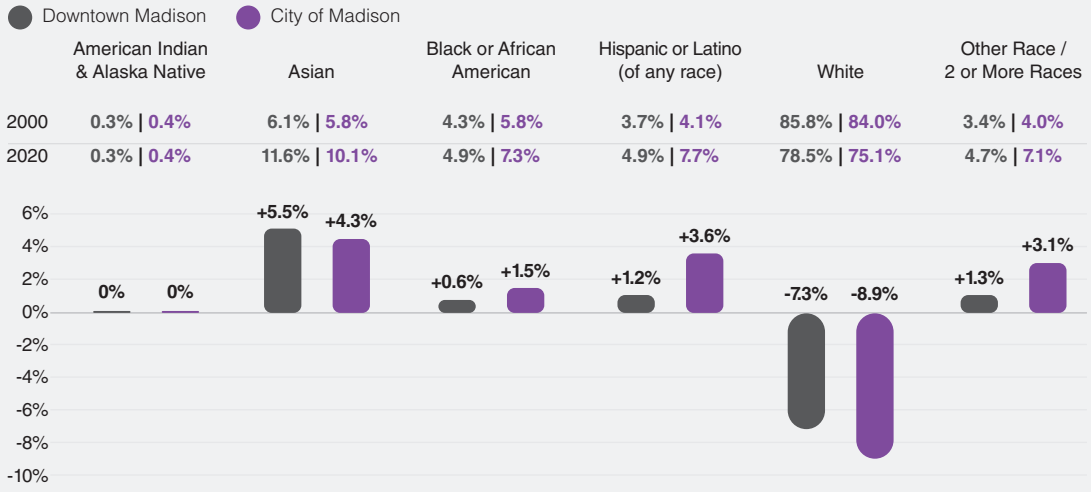
Age Cohort	2000	2020
Under 15 years	0.8%	0.9%
15 to 34 years	87.4%	84.7%
35 to 54 years	7.7%	7.1%
55 to 74 years	2.1%	5.3%
75 years and older	2.0%	2.0%

*Source: U.S. Census Bureau, 2000 Census; ESRI estimates, 2020**

In 2019, the median age of the population in downtown Madison was 23.3 years old.

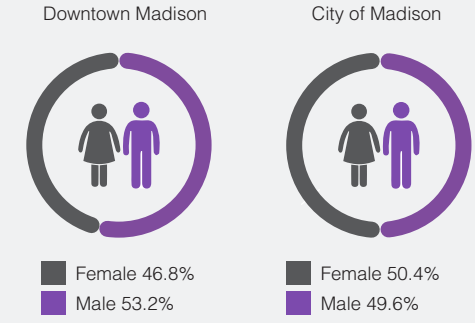
Source: CBRE, ESRI 2020

Race/Ethnicity (percentage change by race)



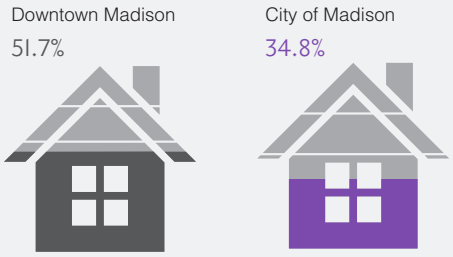
*Source: U.S. Census Bureau, 2000 Census; ESRI estimates, 2020**

Gender



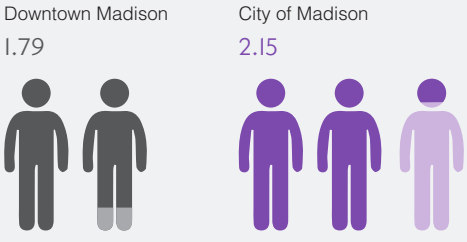
*Source: ESRI estimates, 2020**

Occupied Housing Units Spending 30% or More of Income on Monthly Housing Costs



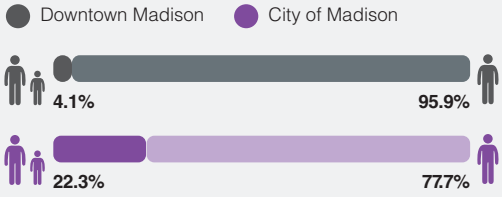
Source: U.S. Census Bureau, 2018 ACS 5-Year estimates (Households spending over 30% of their income on housing are considered cost-burdened).*

Average Household Size



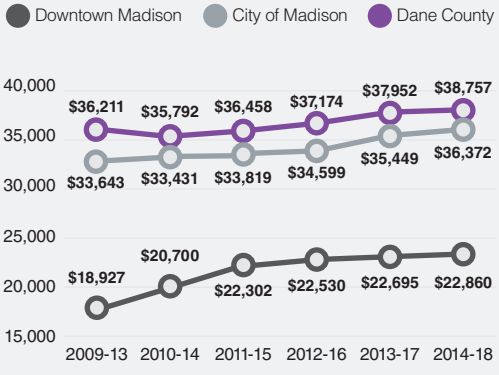
*Source: ESRI estimates, 2020**

Households With vs. Without Related Children Under 18 Years



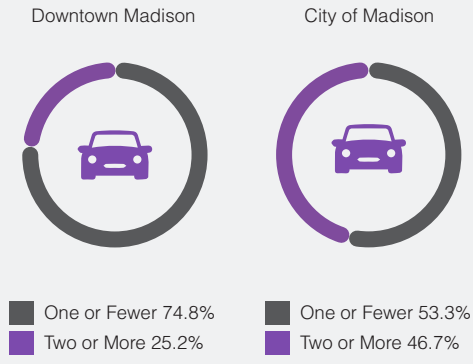
*Source: U.S. Census Bureau, 2018 ACS 5-Year Estimates**

Per Capita Income



*Source: U.S. Census Bureau, 2009-2013, 2010-2014, 2011-2015, 2012-2016, 2013-2017, 2014-2018 American Community Survey 5-year estimates**

Vehicles Available per Household



*Source: U.S. Census Bureau, 2018 ACS 5-Year estimates**

**ESRI data are estimates only that may not include local changes or factors such as the increase of population due to recent development projects. These estimates and Census figures are also not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only. U.S. Census Bureau, American Community Survey 5-year estimates figures are subject to a margin of error based on a 90 percent confidence interval. Per capita income figures are based on periods that contain overlapping years. Period differences in the figures may not be statistically significant. Figures are adjusted for inflation in 2018 dollars. Income for downtown includes student population. Downtown defined as 53703 zip code for household spending on housing, available vehicles and related children under 18 years data.*

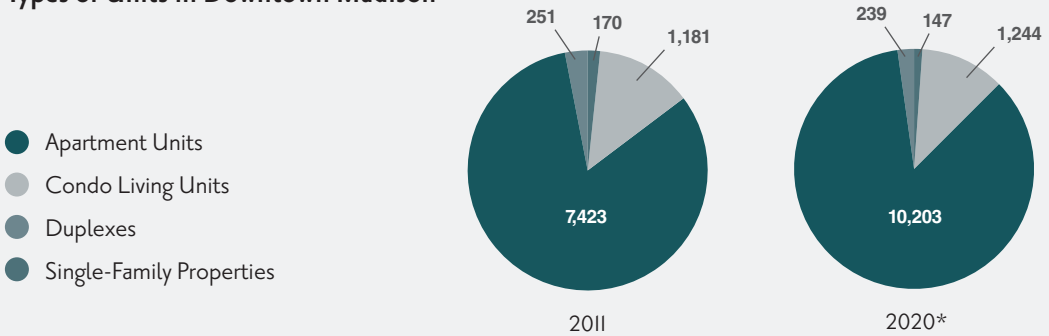
HOUSING

- Central downtown Madison neighborhoods/associations: **6**
  (Bassett, First Settlement, James Madison Park, Mansion Hill, Miffland [all part of Capitol Neighborhoods, Inc.] and State-Langdon)
- Greater downtown Madison area neighborhoods/associations: **9**
  (Bayview Foundation, Inc., Brittingham Apartments Resident's Association, Greenbush, Marquette, Monona Bay, Parkside Resident Association, South Campus Property Owners Association, Tenney-Lapham and Vilas)

Apartment units in downtown Madison: 10,203, an increase of 37.5% from 2011*

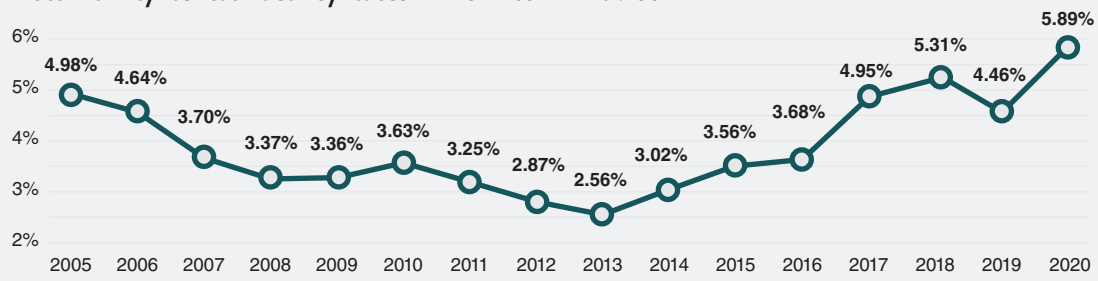
*Source: City of Madison Assessors Office (*compiled by DMI)*

Types of Units in Downtown Madison



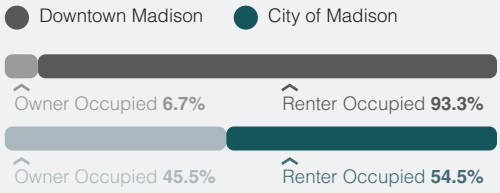
*Source: City of Madison Assessors Office (*compiled by DMI)*

Multi-Family Rental Vacancy Rates in Downtown Madison



Source: Madison Gas & Electric, www.mge.com, Q2 figures for the 53703 zip code area

Occupied Housing Units by Tenure



Source: ESRI estimates, 2020

Median Value of Owner-Occupied Housing Units

Downtown Madison

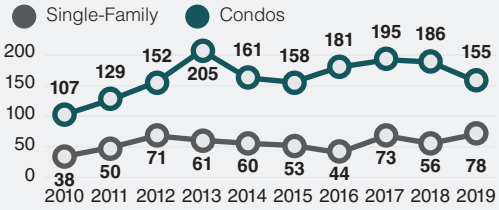
$400,495

City of Madison

$243,650

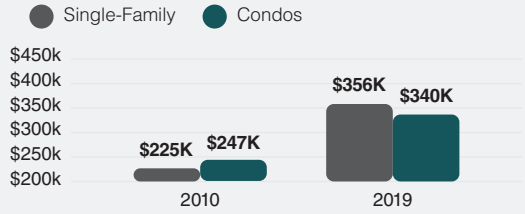
Source: CBRE, ESRI 2020

Home Sales in Greater Downtown Madison



*Source: REALTORS® Association of South Central Wisconsin/South Central MLS *downtown defined as the greater downtown area*

Median Sales Price in Greater Downtown Madison



*Source: REALTORS® Association of South Central Wisconsin/South Central MLS *downtown defined as the greater downtown area*

Average Rental Rates

Location	Average Rent	Average Apartment Size Citywide
Downtown Madison*	$1,655	844 sq.ft.
City of Madison	$1,272	844 sq.ft.
Downtown Minneapolis, MN	$1,593	786 sq.ft.
Downtown Ann Arbor, MI	$1,843	882 sq.ft.
Downtown Austin, TX	$2,826	864 sq. ft.
Downtown Denver, CO	$2,145	842 sq. ft.
Downtown Raleigh, NC	$1,469	958 sq. ft.
Central Business District Seattle, WA	$2,531	693 sq. ft.
Downtown Washington DC	$2,552	744 sq. ft.

*Source: RENTcafé, February 2020, *downtown Madison defined as the Capitol neighborhood area. Per RENTcafé, 1-bedroom apartments are closer to the average apartment size.*

QUALITY OF LIFE & SAFETY

Childcare Facilities in Greater Downtown Madison

- Spots Available: **652**

*Sources: Wisconsin Department of Children & Families, YoungStar Program. *Downtown facilities include: Creative Learning Preschool Inc., Cultured Kids Vilas, Dane County Parent Council Wee Start, Meriter Children's Center, Red Caboose Child Care Center, SSM Health Child Care Center, University Avenue Day Care, Inc., UW Child Development Lab, and Tenney Nursery & Parent Center, Inc. Additional child care facilities may be located in downtown Madison that are not included in these numbers.*

Places of Worship in Greater Downtown Madison

- Members: **16,588**
- Average Weekly Service Attendance: **4,414** (in-person and/or virtual)
- Meals/people served at onsite food pantries/ meal programs in 2019: **38,572** (4% higher than 2018)

Sources: Bethel Lutheran Church, Blackhawk Church-Downtown, Calvary Lutheran Chapel, Faith Community Bible Church, First United Methodist Church*, Grace Episcopal Church*, Pres House (numbers based on students served), Madison Catholic Diocese (St. Raphael Cathedral Parish and St. Paul University Catholic Center), St. John's Lutheran Church, UW Hillel (numbers based on Jewish undergraduate and graduate students at UW-Madison and attendance at Friday services and dinners), and Wisconsin Lutheran Chapel. Additional places of worship may be located in downtown that are not included in these numbers. Some numbers are based on calendar year 2019. *Place of worship included in onsite food pantry/meal program figure.*

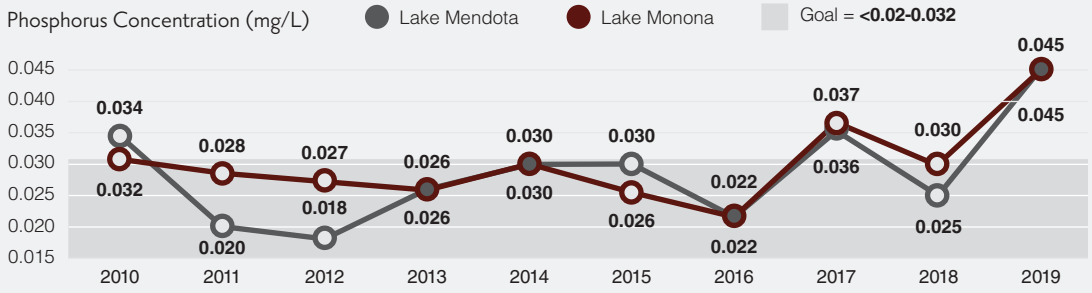
The Beacon, operated by Catholic Charities, is a comprehensive day resource center for people experiencing homelessness in Dane County.

From June 2019 – May 2020:

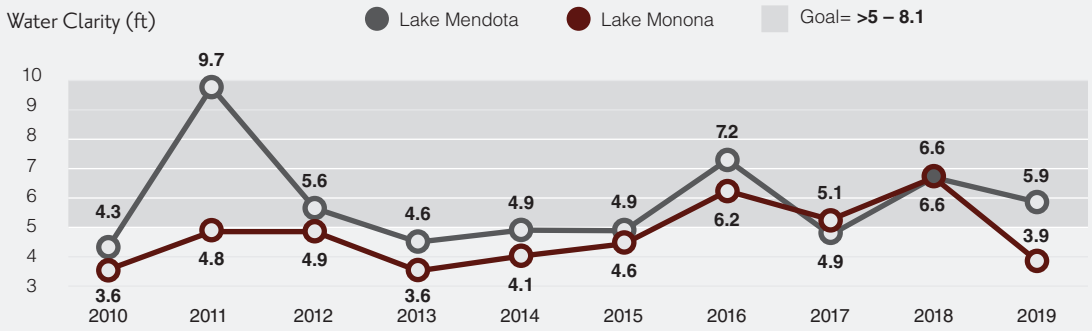
- Average daily guest visits: **208**
- Guests who obtained jobs: **38**
- Guests housed: **48**
- Average monthly volunteers: **120**
- Volunteer hours: **16,046**
- Number of partner agencies as of February 2020: **26** (*services suspended on March 14, 2020 due to COVID-19)

Source: The Beacon

Lakes in Downtown Madison



Source: Clean Lakes Alliance, State of the Yahara Lakes reports

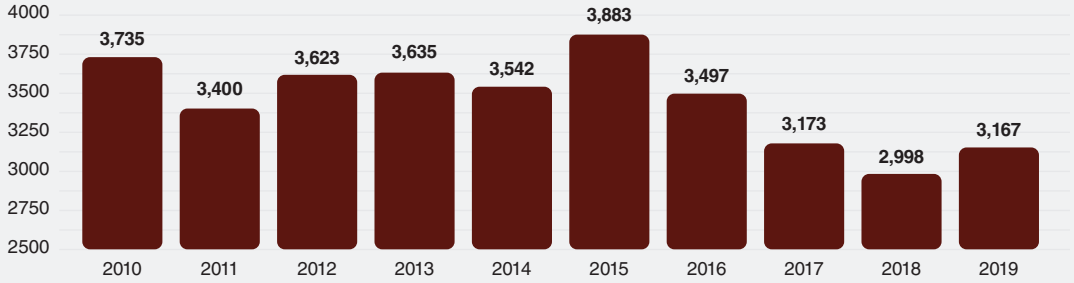


Source: Clean Lakes Alliance, State of the Yahara Lakes reports

- Parks in central downtown Madison: **6** (Brittingham Park, James Madison Park, Law Park, Peace Park, Period Gardens & Proudfit Park)
- Parks in greater downtown Madison: **19**
- Beaches in greater downtown Madison: **5** (B.B. Clarke Beach Park, Brittingham Park, James Madison Park, Tenney Park & Vilas Park)

Source: City of Madison Parks Division website

Criminal Offenses in Downtown Madison*



*Source: City of Madison Police Department (*offenses include: battery simple assault, burglary, theft from building, theft from vehicle, all other larceny, damage/vandalism of property, drug/narcotic violations, disorderly conduct, liquor law violations, and trespass of real property)*

OFFICE MARKET

- Vacancy rate for office space in downtown Madison: **9.05%**, up **1.7%** from 2019
- Downtown Madison is comprised of **57.9%** Class A, **30.3%** Class B and **11.7%** Class C office space

Source: Broadwing Advisors, LLC and REDI/Catylist, Q2 2020

Office Space by Class in Downtown Madison

Class A

Inventory:
2,027,560 sq. ft.

Vacancy Rate:
6.56%

Average Asking Lease Rate:
$29.00 - $36.00

Class B

Inventory:
1,062,705 sq. ft.

Vacancy Rate:
6.84%

Average Asking Lease Rate:
$25.00 - $28.50

Class C

Inventory:
411,385 sq. ft.

Vacancy Rate:
27.05%

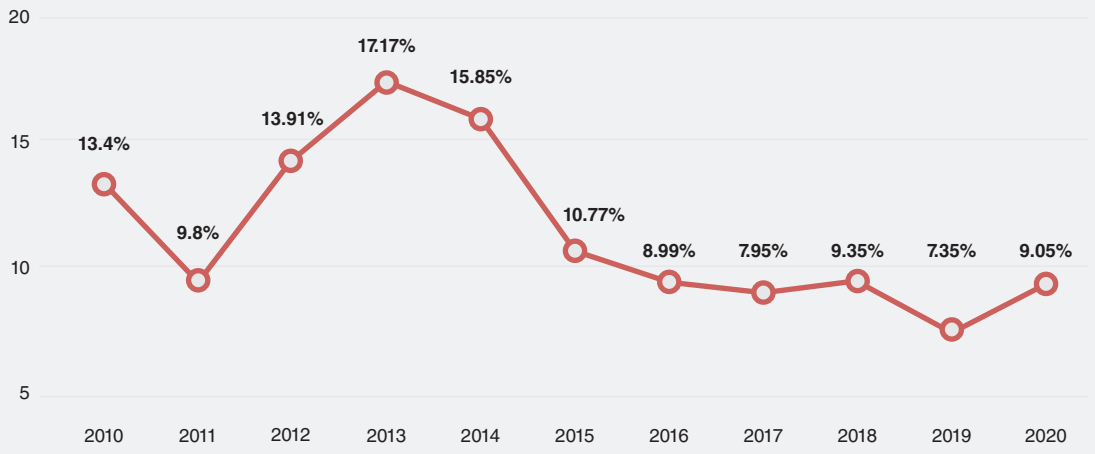
Average Asking Lease Rate:
$19.00 - $24.50

Total

Inventory: 3,501,650 sq. ft. Vacancy Rate: 9.05% Average Asking Lease Rate: $19.00 - $36.00

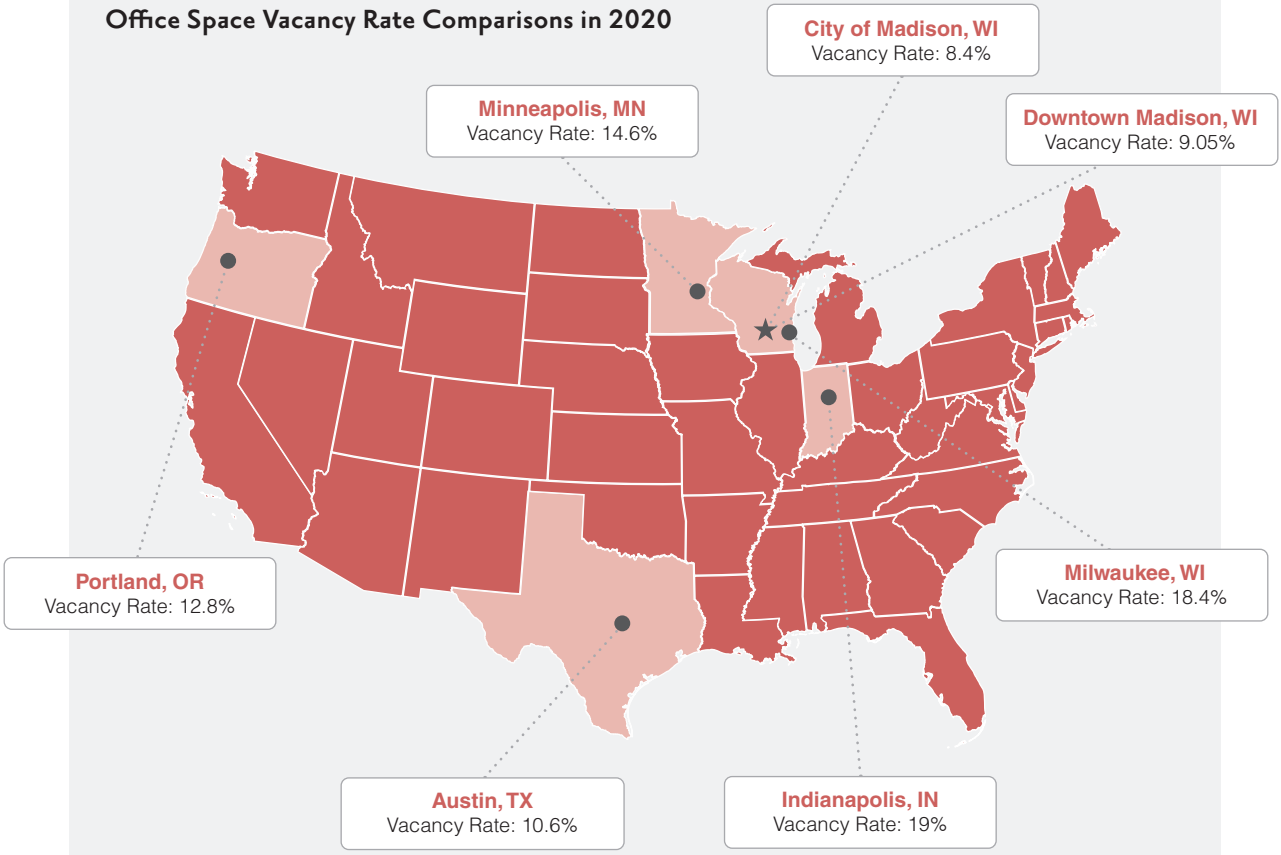
Source: Broadwing Advisors, LLC and REDI/Catylist, Q2 2020

Office Space Vacancy Rates in Downtown Madison



Source: Broadwing Advisors, LLC; Xceligent, Q3 2010-2011, Q2 2012-2017; and REDI/Catylist, Q2 2018-2020

Office Space Vacancy Rate Comparisons in 2020



Source: Broadwing Advisors, LLC, REDI/Catylist, and JLL

EMPLOYMENT

Number of Employees

Downtown:
50,627

City of Madison:
236,099

Dane County:
410,694

Source: CBRE, ESRI 2020

Number of Businesses

Downtown:
1,992

City of Madison:
11,565

Dane County:
22,240

Source: CBRE, ESRI 2020

Employment Status in Downtown Madison

Employed:
97.2%

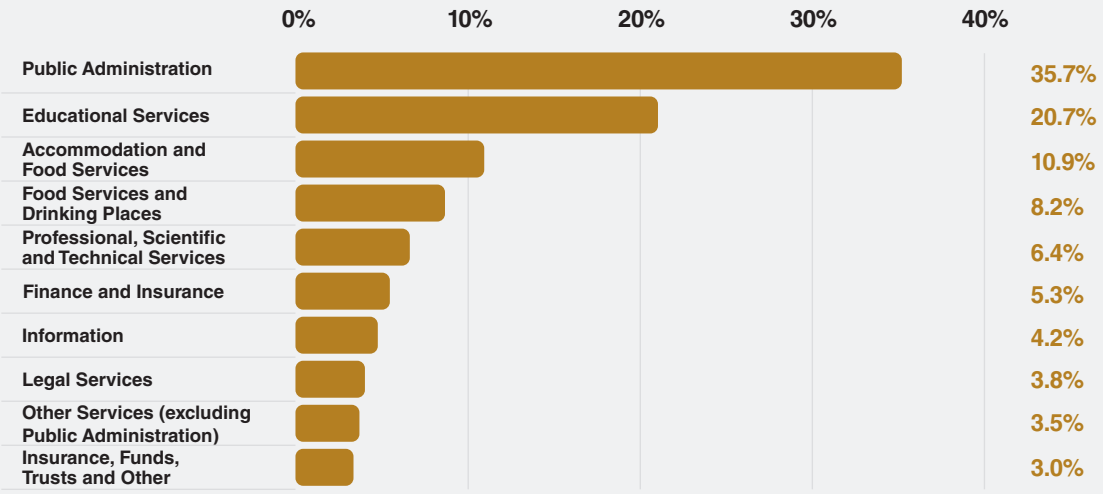
Unemployed:
2.8%

Source: CBRE, ESRI 2020
(civilian population 16+ in labor force)

In 2019, 21.4% of employees citywide were located in downtown Madison.

Source: CBRE, ESRI 2020

Employment by Industry in Downtown Madison (Top 10)



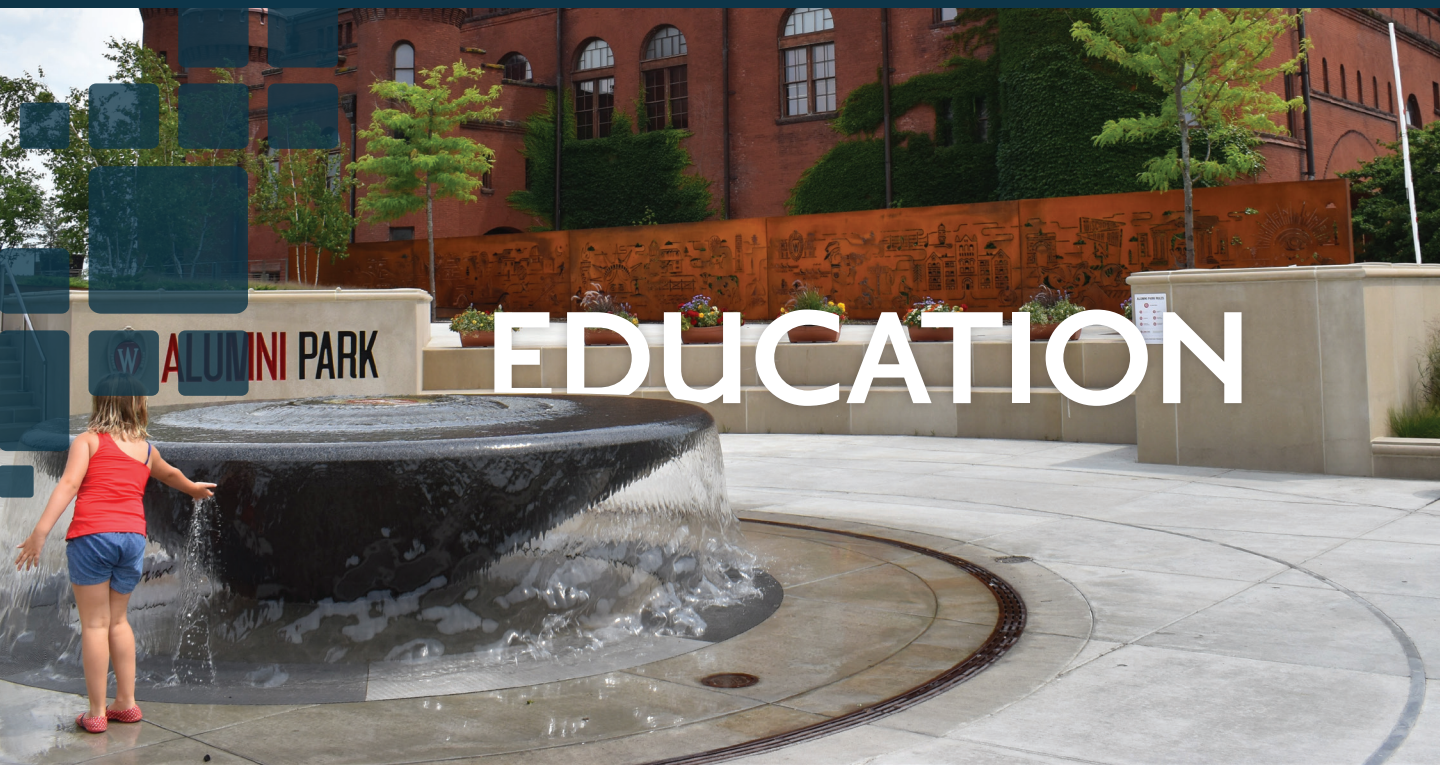
Source: CBRE, ESRI 2020

Private-Sector Businesses in Greater Downtown Madison (Top 10 by Number of Employees)

1. **UnityPoint Health-Meriter Hospital**
   202 S. Park St.
2. **SSM Health St. Mary's Hospital**
   700 S. Park St.
3. **J.H. Findorff & Son Inc.**
   300 S. Bedford St.
4. **Madison Gas & Electric Co.**
   133 S. Blair St.
5. **EatStreet Inc.**
   316 W. Washington Ave.
6. **Zendesk**
   25 W. Main St.
7. **JP Cullen**
   1 S. Pinckney St.
8. **Research Products Corp.**
   1015 E. Washington Ave.
9. **Shopbop.com**
   1245 E. Washington Ave.
10. **National Guardian Life Insurance Co.**
    2 E. Gilman St.

10,337 people are employed by the 10 largest private-sector businesses in downtown Madison compared to **25,721** by the University of Wisconsin-Madison, State of Wisconsin, Dane County and City of Madison combined.

Sources: Madison Regional Economic Partnership (MadREP), June 2020, InBusiness September 2020, 100 Largest Employers in Dane County and University of Wisconsin-Madison, www.wisc.edu/about/facts, November 2019. Size measured by the combined number of full-time and part-time employees. Not all employees work onsite. Downtown defined as 53703, 53706 and 53715 zip code. Data from InBusiness is based on company self-reporting. Data for individual businesses from MadREP is provided by DatabaseUSA.com, which maintains a database of more than 14 million U.S. business entities and InBusiness Book of Lists 2019. Note that in aggregate, data from DatabaseUSA.com will not be consistent with Emsi labor market data due to differences in definitions, methodology, coverage, and industry/geographic classification. Due to a lack of source data at the ZIP code level, Emsi's ZIP-level estimates can be less accurate when looking at a small number of ZIP codes. This is especially likely to occur in rural areas.



EDUCATION

HIGHER EDUCATION IN DOWNTOWN MADISON

University of Wisconsin-Madison

Enrollment (Fall 2019)
45,317

Campus
936 acres (main campus)

Budget (2018-2019)
$3,185,300,000

Research
Expenditure ranking (national), 2017: 6th

Schools & Colleges
13

Faculty & Staff
22,365

Living Alumni (2019)
451,142

Source: University of Wisconsin-Madison, www.wisc.edu/about/facts, November 2019

PRIMARY EDUCATION IN DOWNTOWN MADISON

Madison Metropolitan School District (MMSD)

District Enrollment
Over 27,000 students

Staff (all-district)
2,760 teachers (60% w/ master's degree or higher); Total staff = 5,468

Development Partner
Key philanthropic and resource development partner to MMSD: Foundation for Madison's Public Schools

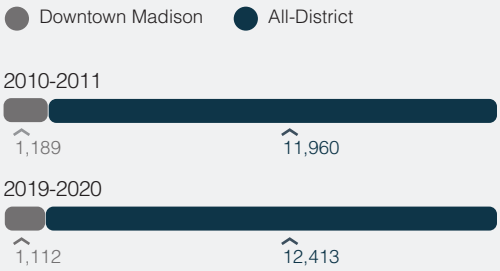
Languages (all-district)
100+ languages spoken
27% of students are English Language Learners
14+ Dual-Language Immersion programs

Operating Budget
2019-2020: $432,928,941

DMI Member Orgs
who are foundation-based Adopt-A-School partners: 12

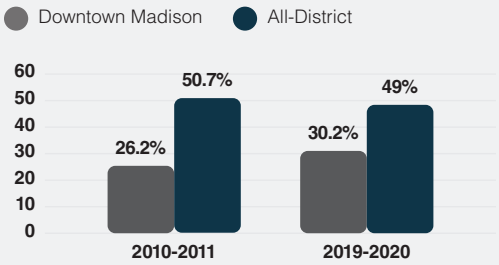
Source: Foundation for Madison's Public Schools, July 2020

MMSD K-5 Enrollment



*Source: Madison Metropolitan School District, www.madison.k12.wi.us for 2010-2011 and 2019-20 Analysis: Equitable Distribution of Staffing for 2019-2020**

MMSD K-5 Enrollment by Free & Reduced Price Meals



*Source: Madison Metropolitan School District, www.madison.k12.wi.us for 2010-2011 and 2019-20 Analysis: Equitable Distribution of Staffing for 2019-2020**

MMSD K-5 Enrollment by Race and Ethnicity

Race	Downtown Madison		All-District	
	2010-2011	2019-2020	2010-2011	2019-2020
Native American	0.2%	0.4%	0.4%	0.3%
Asian	7.3%	4.8%	10%	9.0%
African American	8.4%	10.8%	18.8%	18.0%
Hispanic	9.9%	8.9%	19.6%	21.0%
White	68.4%	65.4%	44.4%	42.0%
Other/Multiracial	5.7%	9.7%	6.8%	10.0%

*Source: Madison Metropolitan School District, www.madison.k12.wi.us for 2010-2011 and 2019-20 Analysis: Equitable Distribution of Staffing for 2019-2020**
**Downtown schools include: Lapham (K-2), Marquette (3-5), Franklin (K-2) and Randall (3-5). Figures exclude 4K and PK programs for 2010-2011 and factor 4K at 60% for 2019-2020.*

RETAIL & RESTAURANTS

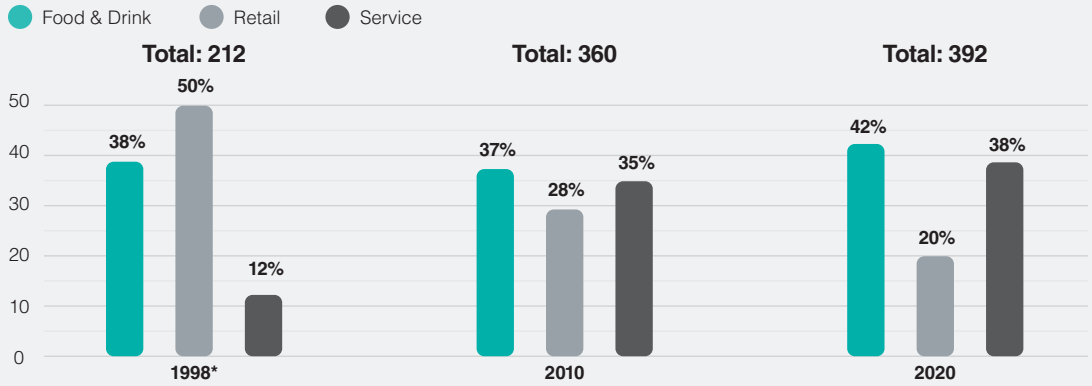
Madison's Central Business Improvement District (BID)

Madison's Central BID is at the heart of downtown's retail/restaurant area and encompasses the greater State Street, Capitol Square and King Street areas (see map on page 3). The Downtown Madison Mall Concourse is roughly the same boundaries as the BID.

- Customers helped by the BID's Downtown Information Ambassador Program in 2019: **39,091**
- Customers helped at the BID's Visitor Center on State Street since its opening in 2010: **195,628**

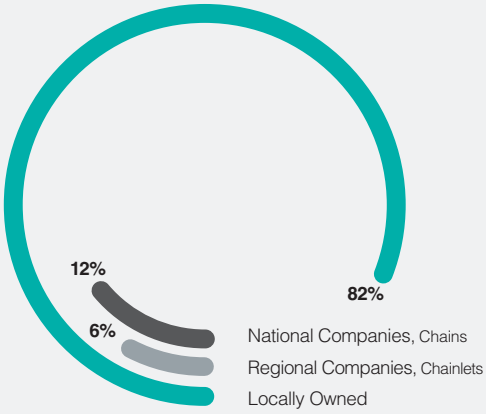
Source: Madison's Central BID

BID Business Type Mix



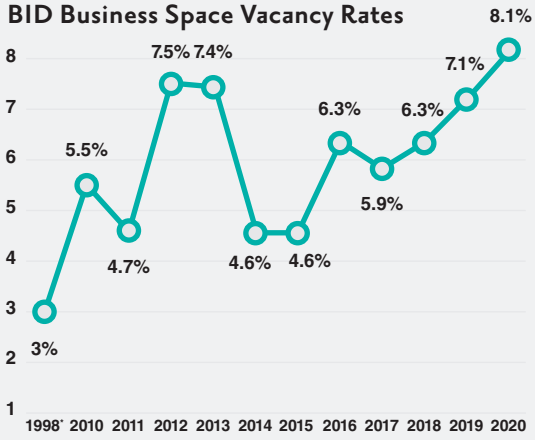
*Sources: Madison's Central BID and Gibbs Report 1998 (BID boundaries expanded in 2018 impacting the number of businesses and spaces available. Available spaces do not include properties slated for development.) *greater State Street area only*

BID Business Ownership Mix



Source: Madison's Central BID, 2020 (Ownership mix figures do not include non-profits. Locally owned includes Wisconsin ownership, locally owned franchises.)

BID Business Space Vacancy Rates



*Sources: Madison's Central BID and Gibbs Report 1998 (BID boundaries expanded in 2018 impacting the number of businesses and spaces available. Available spaces do not include properties slated for development.) *greater State Street area only*

Street Vending in Downtown Madison Mall Concourse

Food Carts Vending Licenses: **43**

Sidewalk Café Licenses across the City of Madison: **79**

Art and Craft Vending Licenses: **49**

Merchant Vending Licenses: **7**

- Of all the sidewalk café licenses across the City of Madison, **79%** are located inside the BID boundaries.

Source: City of Madison Economic Development Division, 2020

Pedestrian Counts along State Street & King Street

Daily Average: **64,425**

Weekly Average: **453,453**

Monthly Average: **1,964,965**

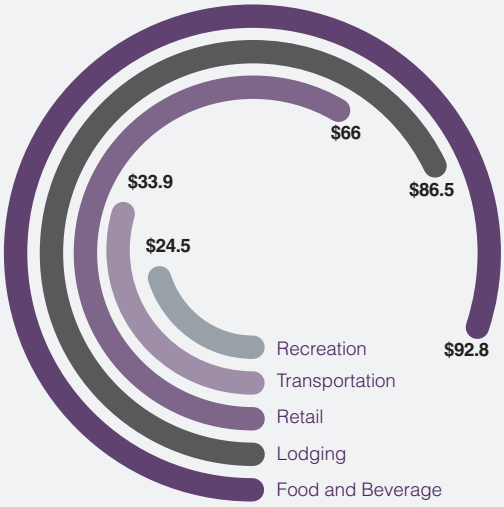
Source: Madison's Central BID (counts for May 2019-April 2020)

TOURISM & ATTRACTIONS

- Visitor spending, visitor supported jobs, and business sales in downtown Madison generated **$38 million** in state and local governmental revenues in 2019, an increase of **19%** since 2015
- Visitor spending in downtown Madison in 2019: **$303.7 million**, an increase of **23%** since 2015
- Jobs supported by visitor activity in downtown Madison in 2019: **4,431**, an increase of **9.2%** since 2015
- Conferences and conventions at Monona Terrace Community & Convention Center in 2019: Number: **60**, Average attendance: **718**, Economic impact: **$33.3 million** and Room nights generated: **31,568**
- Metro Transit bus detours from the Capitol Square due to events in 2019: **32**

Sources: Destination Madison, Tourism Economics, IMPLAN, Wisconsin Department of Revenue (downtown defined as 53703 zip code), Monona Terrace Community & Convention Center Annual Report 2019, Madison Metro

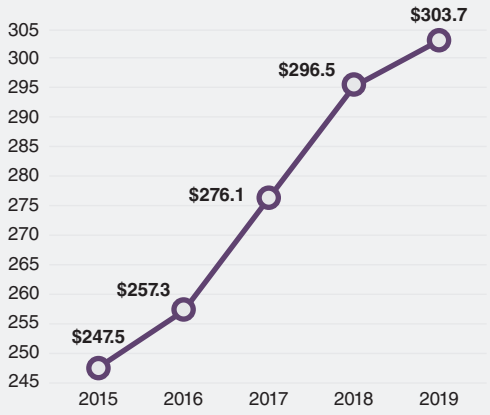
Visitor Spending in Downtown Madison in 2019 (in millions)



Total: $303.7

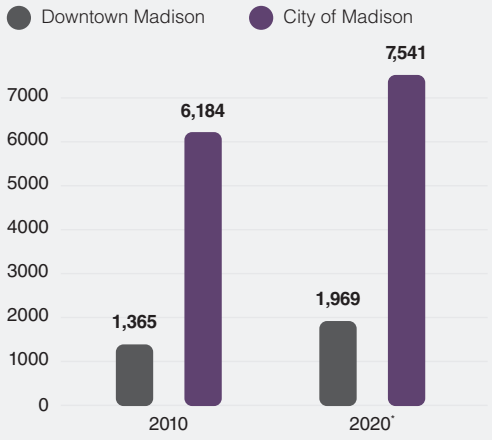
Source: Destination Madison, Tourism Economics (downtown defined as 53703 zip code)

Visitor Spending in Downtown Madison (in millions)



Source: Destination Madison, Tourism Economics (downtown defined as 53703 zip code)

Number of Hotel Rooms/Accommodations



Source: Destination Madison (downtown defined as 53703 zip code)
**includes hotel/motel/resort, bed & breakfast and hostel rooms*

Visits to Destinations in Greater Downtown Madison for 2019*

1. **Memorial Union:** 2,398,930
2. **Union South:** 1,512,628
3. **UW-Madison Athletic Facilities:** 1,477,768
4. **Alliant Energy Center:** 725,806
5. **Henry Vilas Zoo:** 780,000
6. **Wisconsin Institutes for Discovery:** 722,078
7. **Overture Center for the Arts:** 690,175
8. **Monona Terrace Community & Convention Center:** 428,112
9. **Madison Central Library:** 421,564
10. **Madison Children's Museum:** 130,000
11. **Madison Museum of Contemporary Art:** 173,788
12. **Wisconsin Veterans Museum:** 73,813
13. **Wisconsin State Capitol Tours:** 97,367
14. **Breese Stevens Field:** 150,000
15. **Wisconsin Historical Museum:** 71,335

Total: 9,853,364

In 2019-2020, visits to destinations in greater downtown Madison decreased by **16.7%** from 2018-2019.

*Sources: Alliant Energy Center, Big Top Baseball Breese Stevens Field, Henry Vilas Zoo, Madison Children's Museum (fiscal year ending June 30, 2020), Madison Museum of Contemporary Art, Madison Public Library, Monona Terrace Community & Convention Center Annual Report (guests served at all catered functions), Overture Center for the Arts Annual Report (patron experiences 2018-2019 season), UW Athletic Department (all facilities, July 1, 2019–June 30, 2020), Wisconsin Department of Administration, Wisconsin Historical Museum, Wisconsin Institutes for Discovery (door counts), Wisconsin Union (fiscal year ending June 30, 2020), Wisconsin Veterans Museum. *Additional destinations may be located in downtown Madison that are not included in these numbers.*

MOBILITY

MOBILITY IN DOWNTOWN MADISON IN 2019

Bus (Metro Transit)
- Fixed route ridership: **12,856,514**, an increase of **28%** since 2000
- Paratransit ridership: **113,325**
- Routes serving downtown: **35**, including UW circulators

Air
- Dane County Regional Airport passengers: **2,380,047**, an increase of **57%** since 2010

Bicycle
- Bicycle counts on Southwest Path at Monroe St.: **343,431**, a decrease of **16%** since 2015
- Bicycle counts on Capital City Trail at North Shore Dr.: **495,432**, an increase of **40%** since 2015

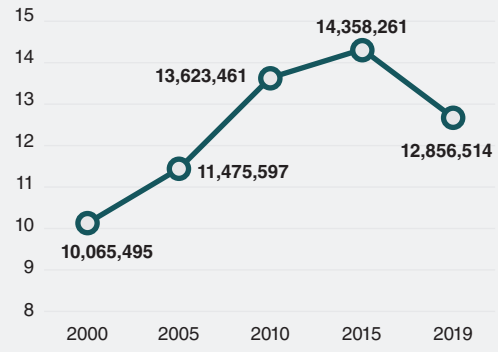
Automobile
- City of Madison parking spaces in downtown: **4,055** off-street and **1,213** on-street metered
- Average weekday traffic crossing the isthmus in 2017: **113,172** vehicles, a decrease of **11%** since 2010

Pedestrian
- Daily average pedestrian count on State Street and King Street: **64,425**

Bike Share (Madison Bcycle)
- Stations: **47**
- Miles biked: **537,923**, an increase of **757%** since 2012
- Trips: **231,000+**, an increase of **124%** over 2018 and the most trips in Madison BCycle history

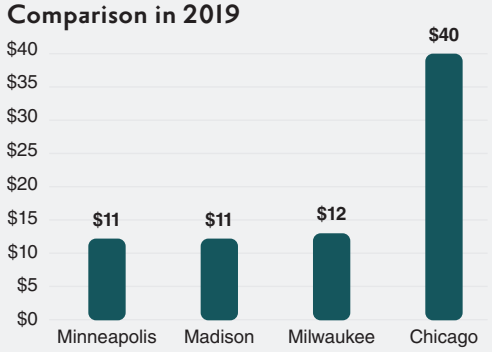
Sources: Metro Transit, Madison BCycle, Dane County Regional Airport, City of Madison Traffic Engineering Eco-Totem counts, City of Madison Traffic Volume Report 2017 (downtown counts taken at the Midtown screen line, Wisconsin Ave. & MLK Jr. Blvd.), City of Madison Parking Utility (Off-street parking spaces include State Street Capitol, Government East, Overture Center, State Street Campus, and Capitol Square North Garages; Brayton, Buckeye, Blair, and Wilson Lots. On-street metered spaces exclude periphery spaces (Schenk's Corner and Monroe St.) and spaces out-of-service long-term.), Madison's Central BID (pedestrian counts from May 2019-April 2020)

Metro Transit Bus System Ridership



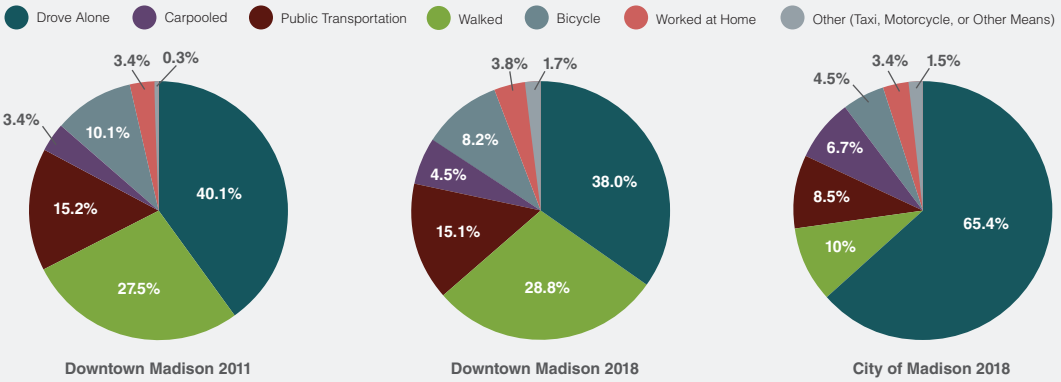
Source: Metro Transit

Median Daily Parking Rates Comparison in 2019



*Sources: City of Milwaukee, City of Minneapolis, City of Madison, Chicago: www.millenniumgarages.com/drive-up-rates/. *Rates are from covered parking facilities owned by each city. There are 3 in Milwaukee, 15 in Minneapolis, and 5 in Madison (Capitol Square North, Government East, Overture Center, State Street Campus, and State Street Capitol Garages. The S. Livingston Street Garage rates were not included in calculations). Chicago's garages are all leased to commercial enterprises. Early-bird special rates were not considered. Rates were calculated for an 8am-5pm parking day and rounded to the nearest dollar.*

Means of Transportation to Work



Source: U.S. Census Bureau, 2011 and 2018 American Community Survey 5-Year estimates; figures are subject to a margin of error. Downtown Madison defined as 53703 zip code.

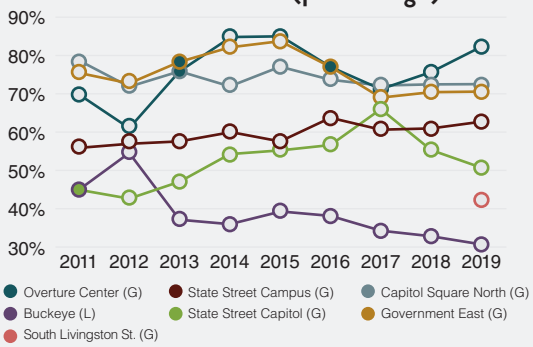
Walk, Transit & Bike Score Comparison

Location	Walk	Transit	Bike
Downtown Portland, OR	96	94	90
Downtown West Minneapolis, MN	93	94	89
Downtown Madison, WI	**93**	**62**	**89**
Downtown Austin, TX	92	68	89
Downtown Boulder, CO	83	57	89

*Source: Walk Score®, www.walkscore.com, July 2020**

**Walk Score® measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Transit Score measures how well a location is served by public transit based on the distance and type of nearby transit lines. Bike Score measures whether an area is good for biking based on bike lanes and trails, hills, road connectivity, and destinations. The scores are based on a weighted average of the scores of many addresses in the neighborhood. 100=high, 0=low.*

Occupancy Rates for Garages and Lots in Downtown Madison (percentage)



Source: City of Madison Parking Utility (occupancy rates measured from 10am-2pm). G=garage, L=lot.

SUSTAINABILITY

- LEED Certified and Registered Projects:
  - Downtown Madison: **27**
  - City of Madison: **122**

Source: U.S. Green Building Council, www.usgbc.org, LEED Project Directory, August 2020 (downtown Madison defined as 53703 zip code)

22% of all LEED Certified and Registered Projects in the City of Madison are located downtown.

Source: U.S. Green Building Council, www.usgbc.org, LEED Project Directory, August 2020 (downtown Madison defined as 53703 zip code)

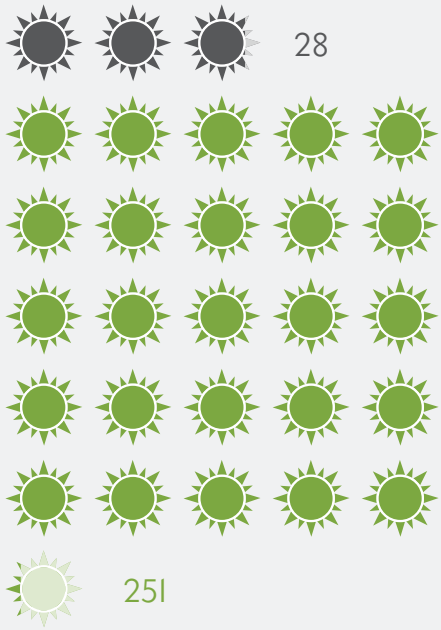
Electric Vehicle Charging Locations in Greater Downtown Madison 2020

1. UW-Madison Lot 36
2. UW-Madison Lot 17
3. UW-Madison Lot 20
4. Wisconsin Union Hotel
5. Henry Vilas Zoo
6. UW-Madison Lot 7
7. UW-Madison Lot 29
8. City of Madison State Street Campus Garage
9. Ovation 309
10. City of Madison Overture Center Garage
11. Hilton Madison Monona Terrace
12. The Edgewater Hotel
13. City of Madison Capitol Square North Garage
14. Madison Gas and Electric – 2
15. Madison Gas and Electric – 3
16. City of Madison South Livingston St Garage
17. Festival Foods
18. Lyric Apartments
19. Willy Street Co-op East

Source: PlugShare, www.plugshare.com, August 2020

Solar Installations

Downtown Madison City of Madison



Source: Google Project Sunroof, last updated 11/2018, www.google.com/get/sunroof/data-explorer. (downtown Madison defined as 53703 zip code)

Community-Supported Agriculture Pick-up Locations

Downtown Madison

Source: Fair Share CSA Coalition, www.csacoalition.org, Farm Search CSA pickup location map, August 2020

Community Gardens

Downtown Madison City of Madison

Source: The Gardens Network, danegardens.net, August 2020

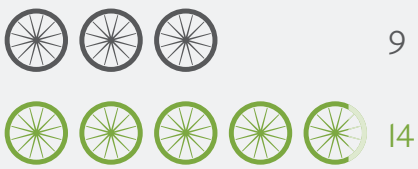
Electric Vehicle Charging Stations

Downtown Madison

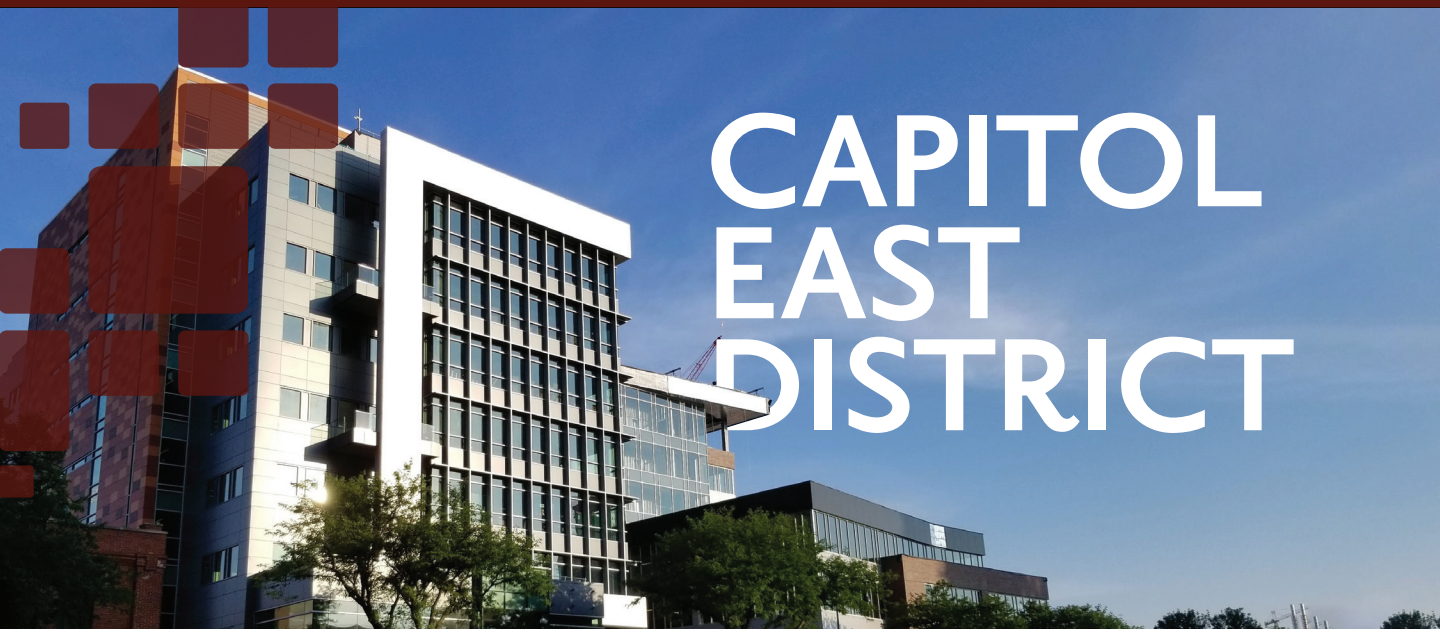
Source: PlugShare, www.plugshare.com, August 2020

Bike-Friendly Businesses

Downtown Madison City of Madison



Source: The League of American Bicyclists, bikeleague.org, August 2020



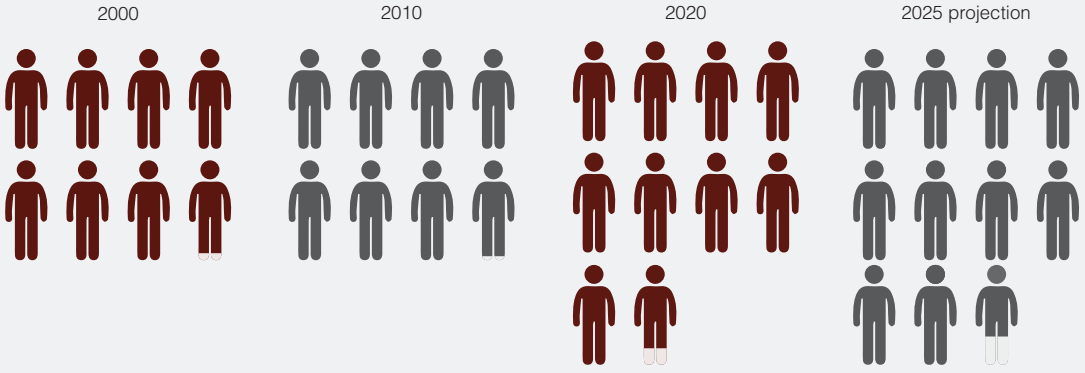
CAPITOL EAST DISTRICT

The Capitol East District is directly east of the central downtown and is bounded by Lake Mendota, Lake Monona, Blair Street and the Yahara River (see map on page 3).

- New development approved in the Capitol East District in 2019:
  - **8** projects
  - **168** residential units
  - **13,227** sq. ft. of commercial space
  - **37,999** sq. ft. of office space
  - **61,446** sq. ft. of institutional space
- Residential units constructed or approved for construction in the Capitol East District since 2010: **1,727**
- Tax base in the Capitol East District in 2020: **$1.3 billion**, an increase of **78%** since 2013*
- Real estate and personal property taxes generated in the Capitol East District in 2020: **$27.2 million**, up **$9.7 million** since 2013*
- Occupancy rate for the City of Madison South Livingston Street Garage in 2019: **42%**

*Sources: City of Madison Planning Division, City of Madison Assessors Office (*compiled by DMI), City of Madison Parking Utility (occupancy rates measured from 10am-2pm)*

Population in Capitol East District



*Source: U.S. Census Bureau, 2000, 2010 Census; ESRI estimates, 2020 and 2025 projection**

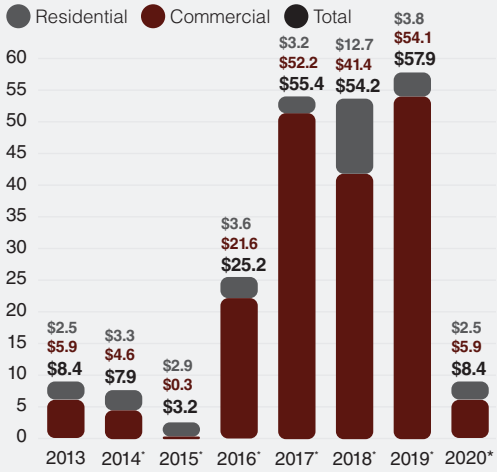
From 2000 to 2020, the population of the Capitol East District has increased by 19%.

*Source: U.S. Census Bureau, 2000 Census and ESRI estimates, 2020**

Employment in Capitol East District

Source: CBRE, ESRI 2020

New Construction in Capitol East District (in millions)



*Source: City of Madison Assessors Office (*compiled by DMI) Residential defined as Single-Family, Condominium, 2-unit and 3-7 unit properties only. All other properties including large apartment buildings defined as commercial.*

**ESRI data are estimates only that may not include local changes or factors such as the increase of population due to recent development projects. These estimates and Census figures are also not direct comparisons due to differences in the sources and data collection methodologies. Comparisons are for estimates only.*

COVID-19 IMPACT

EMPLOYMENT IMPACT

Madison Region Remote Work Survey - COVID-19 Impact

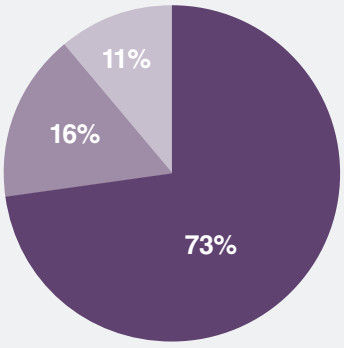
The Madison Area Transportation Planning Board conducted the Madison Region Remote Work Survey in Dane County between June 9-30, 2020, to assess the impact of COVID-19 on remote work trends and attitudes in the greater Madison region. The survey received **1,881** responses from employees, managers, and executive leaders from a broad range of business, agency, and organization sizes and types. Some key findings from the survey relevant to downtown Madison are listed below.

Demographics for survey responses:

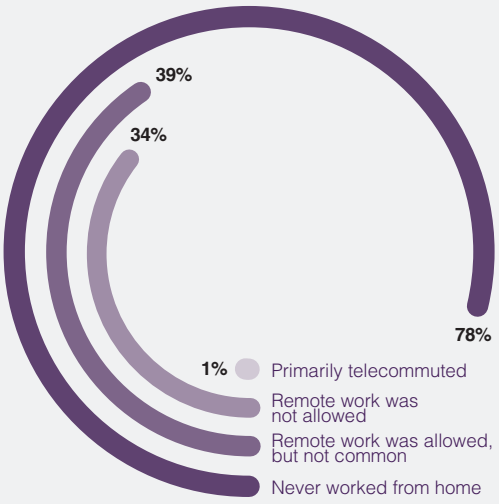
38% work in the 53703 zip code

5% live in the 53703 zip code

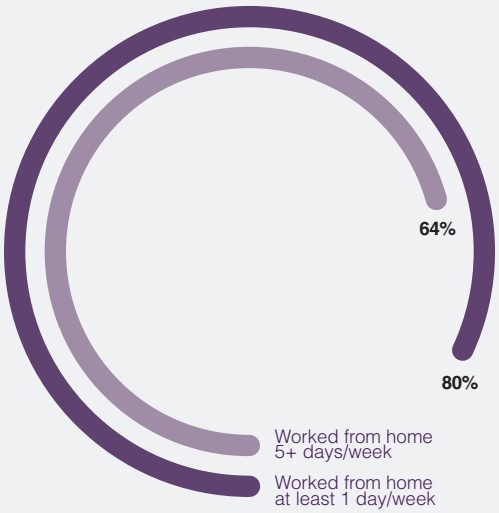
99% are actively working



Prior to the COVID-19 Pandemic:



During the Pandemic:*



When the most restrictions were in place defined as March 25-May 26, 2020

61% said their organization was somewhat prepared to transition to remote work while 10% said their organization was not at all prepared.

When business returns to normal:

79% of respondents would prefer to continue working from home at least 1 day per week

69% of respondents will view an employer more favorably if they have the option to work remotely

- Of the executive leaders & managers, **69%** believe more employees will work from home periodically in the future, and **51%** intend to take steps to make it easier for employees to work from home in case of future emergencies.

Source: Madison Area Transportation Planning Board (statistics not based on an official survey write-up)

TOURISM IMPACT

Destination Madison Cancellations (as of 8/6/2020)

71 Cancelled Events

146,000+ Expected Attendees

100,000+ Room Nights

- These events were expected to generate over **$52 million** in direct spending in the community.

*Source: Destination Madison (*numbers represent cancellations experienced among the business booked by Destination Madison and don't include the impact of events such as WIAA or World Dairy Expo, or any business booked directly through hotels or other venues)*

Wisconsin Athletics Cancellations (all facilities between 7/1/2019–6/30/2020)

318 Estimated Cancelled Events

340,214 Estimated Attendees

- **$16 million** lost in total economic impact on the Wisconsin economy for each cancelled home football game without fans.

*Source: UW Athletic Department (*numbers are for all UW Athletics facilities), Wisconsin Athletics Economic Impact Report, June 2019*

MOBILITY IMPACT

Metro Transit

80% decrease in fixed monthly ridership in June 2020 compared to June 2019

Source: Metro Transit

Pedestrian Counts

65% decrease in pedestrians counted from March-July 2020 compared to the same timeframe in 2019

Source: Madison's Central BID (counts are from a total of 14 pedestrian counters located throughout the BID—12 on State Street and 2 on King Street)

Madison BCycle (Bike Share)

- **109% increase** in total miles ridden during January-July 2020 compared to the same timeframe in 2019
- **58% increase** in ridership during March-June 2020 compared to the same timeframe in 2019
- **11,000+ more** riders in June 2020 compared to June 2019

Source: Madison BCycle

Bicycle Counts

- **11% decrease** in bicycles counted on Southwest Path at Monroe St. from January-July 2020 compared to the same timeframe in 2019
- **12% increase** in bicycles counted on Capital City Trail at North Shore Dr. from January-July 2020 compared to the same timeframe in 2019

Source: City of Madison Traffic Engineering Eco-Totem counts

City of Madison Parking Utility

- **Less than 5%** parking occupancy from mid-March through early-June 2020*
- **69% decrease** in parking revenue in June 2020 compared to June 2019
- Between **$900K** and **$1.3 million** of revenue was lost each month from April-June 2020

*Source: City of Madison Parking Utility (*parking occupancy numbers not official and were based on snapshots of data at various times. Revenue impacts were due to fee waivers for on-street parking meters for streateries and loading zones, and the significant decline in use/occupancy)*

Dane County Regional Airport

45.5% decrease in passengers to date through May 2020 compared to the same timeframe in 2019

Source: Dane County Regional Airport

RETAIL & RESTAURANTS IMPACT

Business Turnover in Madison's Central Business Improvement District (BID)

18 known new/incoming businesses

24 known closed/closing businesses

Source: Madison's Central BID (numbers are year-to-date as of September 30, 2020)

Downtown Madison Streatery Program

The City of Madison created the Streatery program to temporarily allow restaurants, taverns and other eligible businesses to expand their business footprint onto the public rights of-way or in privately owned parking facilities if approved.

26 approved on private property

41 expansions approved on sidewalks and parking lanes

4 café zones downtown

STREET CLOSURE of State St. from Friday evening – Sunday

Source: City of Madison Economic Development Division (numbers as of 7/6/2020)

THANK YOU TO THE 2020 STATE OF THE DOWNTOWN SPONSORS

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Steve Brown Apartments

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Urban Land Interests

UW Health

UnityPoint Health Meriter

Quartz

WIPFLI

Associate Sponsors

360 Commercial Real Estate

Alliant Energy

Ho-Chunk Gaming Madison

Monona Terrace Community & Convention Center

Designed By

Nelson Schmidt

Produced in October 2020 by:

DOWNTOWN MADISON INC

MISSION STATEMENT: Downtown Madison, Inc. is committed to planning for, sustaining and growing downtown Madison as a thriving regional economic engine that offers a best-in-class quality of life for businesses, residents and visitors.

VALUES STATEMENT: DMI strives to be an inclusive organization committed to respect and generosity of spirit. We believe that diversity strengthens downtown Madison and our entire community and encourage our members to engage with, learn from, and develop an understanding of others. We expect behavior that exhibits respect for all people and supports these values at DMI gatherings.

Downtown Madison, Inc. | 122 W. Washington Ave., Suite 250 | Madison, WI 53703 | www.downtownmadison.org